February 2025

Boston Family Office, LLC
Part 2B of Form ADV
Brochure Supplement

88 Broad Street
Boston, MA 02110
(617) 624-0800
www.bosfam.com

This brochure supplement provides information about George P. Beal, Darren L Beals, Dylan C. Brix, E. Greer Candler, Michael J. Dorsey, Jr., Peder C. Johnson, George Putnam, III, Benjamin T. Richardson, Eliza H. S. "Happy" Rowe, and Michael J. Unger. This is a supplement to the Boston Family Office Form ADV, Part 2A (also known as our Brochure). You should have received a copy of the Brochure. Please contact the Boston Family Office if you did not receive the Boston Family Office's Brochure or if you have any questions about the contents of the supplement.

Additional information about the individuals listed above is available on the Security and Exchange Commission's website at www.adviserinfo.sec.gov.

George P. Beal

Educational Background and Business Experience

Mr. Beal was born in 1953.

Educational Background

University of Pennsylvania Philadelphia, PA	Graduated 1975 BA – American Civilization

Business Background

Boston Family Office Boston, MA	1996 to present Portfolio Manager, Partner
Breckinridge Capital Advisors Boston, MA	2011 to present Board of Directors
Northeast Investors Trust Boston, MA	2005 to 2023 Trustee
Cambridge Trust Company Cambridge, MA	1990-1996 Vice President, Lending
Bank of New England Boston, MA	1979-1990 Assistant Vice President, Commercial Lending

Disciplinary Information

There have been no legal or disciplinary actions against Mr. Beal.

Other Business Activities

Mr. Beal sits on the Board of Directors of Breckinridge Capital Advisors, a manager of fixed income portfolios. As a volunteer, Mr. Beal serves as Treasurer of Homeowners Rehab, Inc., a developer of affordable housing in Cambridge, MA; he is also a member of the Cambridge Community Foundation's investment committee, and the Council for the Arts at MIT. Mr. Beal is a graduate of the National Trust School.

Additional Compensation

Mr. Beal receives compensation for his duties as a director of Breckinridge Capital Advisors. He is trustee of several trusts and in some cases receives compensation for those duties. Other than that, he does not receive economic benefits from any person or entity other than the Boston Family Office in connection with providing investment advice to clients.

Supervision

Each portfolio manager at the Boston Family Office operates independently. All of Mr. Beal's accounts, and all investment management accounts of the Boston Family Office for that matter, are reviewed by the Investment Committee at least twice a year. The supervision is informal, but concerns can be raised to Benjamin Richardson, Chief Investment Officer. Mr. Richardson can be reached at (617) 624-0800.

Darren L. Beals

Educational Background and Business Experience

Mr. Beals was born in 1972.

Educational Background

Babson College Wellesley, MA	Graduated 2005 Master of Business Administration
Northeastern University Boston, MA	Graduated 1999 BS in Business Administration, Finance
University of New Hampshire Durham, NH	Graduated 1994 BS in Education

Business Background

Boston Family Office Boston, MA	2021 – present Chief Compliance Officer, COO
New Generation Advisors Manchester, MA	2008 – 2021 CFO, CRO, and Member of the Firm
JP Morgan Chase & Company Boston, MA	2007 – 2008 VP - Senior Financial Reporting Manager
MFS Investment Management Boston, MA	2000 – 2007 AVP – Financial Reporting and Fund Admin

Disciplinary Information

There have been no legal or disciplinary actions against Mr. Beals.

Other Business Activities

Mr. Beals is not involved in any investment-related business apart from the Boston Family Office.

Additional Compensation

Mr. Beals is a trustee of a trust and receives compensation for those duties.

Supervision

Mr. Beals does not manage client portfolios or relationships. He is responsible for compliance and other operational areas, working with all members of the firm. Concerns can be raised to George P. Beal. Mr. Beal is the Managing Partner and can be reached at (617) 624-0800.

Dylan C. Brix, CFA

Educational Background and Business Experience

Mr. Brix was born in 1985.

Educational Background

Bowdoin College Brunswick, ME	Graduated 2007 BA – English, Government & Legal Studies

Chartered Financial Analyst #6283126 (please see the note at the end of this brochure regarding the CFA designation)

Business Background

Boston Family Office Boston, MA	2020 to present Portfolio Manager
Reynders, McVeigh Capital Management Boston, MA	2017 to 2020 Portfolio Manager
Athenahealth, Inc. Watertown, MA	2016 to 2017 Manager
Loring, Wolcott & Coolidge Trust Boston, MA	2014 to 2016 Equity Analyst

Algonquin Advisors Greenwich, CT	2007 to 2014 Vice President

Disciplinary Information

There have been no legal or disciplinary actions against Mr. Brix.

Other Business Activities

Mr. Brix is not involved in any investment-related business apart from the Boston Family Office.

Additional Compensation

Mr. Brix does not receive economic benefits from any person or entity other than the Boston Family Office in connection with providing investment advice to clients.

Supervision

Each portfolio manager at the Boston Family Office operates independently. All of Mr. Brix's accounts, and all investment management accounts of the Boston Family Office for that matter, are reviewed by the Investment Committee at least twice a year. The supervision is informal, but concerns can be raised to George P. Beal or Benjamin Richardson. Mr. Beal is the Managing Partner and Mr. Richardson is the Chief Investment Officer. They can be reached at (617) 624-0800.

E. Greer Candler, CFA

Educational Background and Business Experience

Ms. Candler was born in 1954.

Educational Background

Trinity College Hartford, CT	Graduated 1976 BA – Economics

Chartered Financial Analyst #8943 (please see the note at the end of this brochure regarding the CFA designation)

Business Background

Boston Family Office Boston, MA	2010 to present Portfolio Manager, Partner

Norris, Perne and French Grand Rapids, MI	1998 – 2008 Portfolio Manager, Partner
Old Kent Financial Grand Rapids, MI	1980 – 1988 Vice President, Trust

Disciplinary Information

There have been no legal or disciplinary actions against Ms. Candler.

Other Business Activities

Ms. Candler is not involved in any investment-related business apart from the Boston Family Office. She is Vice President of the Gore Place Board of Governors.

Additional Compensation

Ms. Candler does not receive economic benefits from any person or entity other than the Boston Family Office in connection with providing investment advice to clients.

Supervision

Each portfolio manager at the Boston Family Office operates independently. All of Ms. Candler's accounts, and all investment management accounts of the Boston Family Office for that matter, are reviewed by the Investment Committee at least twice a year. The supervision is informal, but concerns can be raised to George P. Beal or Benjamin Richardson. Mr. Beal is the Managing Partner and Mr. Richardson is the Chief Investment Officer. They can be reached at (617) 624-0800.

Michael J. Dorsey, Jr., CFA

Educational Background and Business Experience

Mr. Dorsey was born in 1985.

Educational Background

Wesleyan University Middletown, CT	Graduated 2008 BA – American Studies
Boston University Boston, MA	Graduated 2013 MS – Investment Management

Chartered Financial Analyst #182899
CERTIFIED FINANCIAL PLANNER™ #286617

(Please see the note at the end of this brochure regarding these designations)

Business Background

Boston Family Office Boston, MA	2020 to present Portfolio Manager, Partner
Steward Partners Global Advisory Boston, MA	2017 to 2020 Wealth Manager
Boston Advisors Boston, MA	2011 to 2017 Portfolio Manager & Equity Analyst
Brown Brothers Harriman Boston, MA	2008 to 2011 Operations Analyst

Disciplinary Information

There have been no legal or disciplinary actions against Mr. Dorsey.

Other Business Activities

Mr. Dorsey is not involved in any investment-related business apart from the Boston Family Office. He is a board member for the Mal's Pals Foundation.

Additional Compensation

Mr. Dorsey does not receive economic benefits from any person or entity other than the Boston Family Office in connection with providing investment advice to clients.

Supervision

Each portfolio manager at the Boston Family Office operates independently. All of Mr. Dorsey's accounts, and all investment management accounts of the Boston Family Office for that matter, are reviewed by the Investment Committee at least twice a year. The supervision is informal, but concerns can be raised to George P. Beal or Benjamin Richardson. Mr. Beal is the Managing Partner and Mr. Richardson is the Chief Investment Officer. They can be reached at (617) 624-0800.

Peder C. Johnson, CFA

Educational Background and Business Experience

Mr. Johnson was born in 1970.

Educational Background

Thomas Edison State College Trenton, NJ	Graduated 2003 BS – Business Administration
Boston University Boston, MA	Graduated 2005 MS – Investment Management

Chartered Financial Analyst #111742
(please see the note at the end of this brochure regarding the CFA designation)

Business Background

Boston Family Office Boston, MA	2016 to present Portfolio Manager, Partner
Roxiticus Partners, LLC Charlestown, MA	2010 – 2015 Portfolio Manager, Managing Director
Parkman Shaw & Company, Inc Brookline, MA	2004 – 2010 Portfolio Manager, Analyst

Disciplinary Information

There have been no legal or disciplinary actions against Mr. Johnson.

Other Business Activities

Mr. Johnson is not involved in any investment-related business apart from the Boston Family Office. He volunteers time to several non-profits including: The Shaw Fund for Mariners' Children, the North Bennet Street School, the Strong-Cuevas Foundation, and the Charlestown Youth Hockey Association.

Additional Compensation

Mr. Johnson serves as trustee for several trusts and is compensated for those duties. Other than that, he does not receive economic benefits from any person or entity other than the Boston Family Office in connection with providing investment advice to clients.

Supervision

Each portfolio manager at the Boston Family Office operates independently. All of Mr. Johnson's accounts, and all investment management accounts of the Boston Family Office for that matter, are reviewed by the Investment Committee at least twice a year. The supervision is informal, but concerns can be raised to George P. Beal or Benjamin

Richardson. Mr. Beal is the Managing Partner and Mr. Richardson is the Chief Investment Officer. They can be reached at (617) 624-0800.

George Putnam, III
New Generation Advisors
13 Elm Street, Suite 2
Manchester, MA 01944

Educational Background and Business Experience

Mr. Putnam was born in 1951.

Educational Background

Harvard College Cambridge, MA	Graduated 1973 BA
Harvard Business School Harvard Law School Cambridge, MA	Graduated 1978 Joint JD and MBA

Business Background

New Generation Advisors Manchester, MA	1988 to present President
New Generation Research Boston, MA	1986 to present Chairman
Putnam Group of Mutual Funds Boston, MA	1984 to present Trustee
Boston Family Office Boston, MA	1996 to present Partner, Outside Director

Disciplinary Information

There have been no legal or disciplinary actions against Mr. Putnam.

Other Business Activities

Mr. Putnam is not involved in the daily operations of the Boston Family Office. He is the President of New Generation Advisors, which formerly managed funds investing in distressed securities, and Chairman of New Generation Research, Inc., which publishes bankruptcy and turnaround data. Mr. Putnam also serves as Trustee of the Putnam Group of Mutual Funds. He is a director of the Gloucester Marine Genomics Institute in Gloucester, MA. He also sits on the investment committees of several other nonprofit organizations.

Additional Compensation

Mr. Putnam's primary compensation comes from sources other than the Boston Family Office. Some clients of the Boston Family Office invest in mutual funds managed by the Putnam Group of Mutual Funds. There are fees related to these investments, over and above the fees charged by the Boston Family Office. Mr. Putnam is not compensated for business referred to these entities, nor do those entities compensate any BFO personnel for referrals.

Supervision

Mr. Putnam is an outside director and not involved in the daily operations of the Boston Family Office.

Benjamin T. Richardson, CFA

Educational Background and Business Experience

Mr. Richardson was born in 1975.

Educational Background

Connecticut College New London, CT	1993-1995
Harvard College Cambridge, MA	Graduated 1997 BA – Economics

Chartered Financial Analyst #411089 (please see the note at the end of this brochure regarding the CFA designation)

Business Background

Boston Family Office Boston, MA	2004 – present Portfolio Manager, Partner

Disciplinary Information

There have been no legal or disciplinary actions against Mr. Richardson.

Other Business Activities

Mr. Richardson is not involved in any investment-related business apart from the Boston Family Office.

Additional Compensation

Mr. Richardson is a trustee of several trusts and in some cases receives compensation for those duties. Other than that, he does not receive economic benefits from any person or entity other than the Boston Family Office in connection with providing investment advice to clients.

Supervision

Each portfolio manager at the Boston Family Office operates independently. All of Mr. Richardson's accounts, and all investment management accounts of the Boston Family Office for that matter, are reviewed by the Investment Committee at least twice a year. The supervision is informal, but concerns can be raised to George P. Beal, as Mr. Richardson serves as the Chief Investment Officer. Mr. Beal is the Managing Partner and can be reached at (617) 624-0800.

Eliza H. S. "Happy" Rowe

Educational Background and Business Experience

Ms. Rowe was born in 1969.

Educational Background

Denison University Granville, OH	Graduated 1991 BA – History

Business Background

Boston Family Office Boston, MA	2000 to present Portfolio Manager, Partner
Tucker Anthony, Inc. / Freedom Capital Mgmt. Boston, MA	1991 – 2000 Investment Executive, Portfolio Asst., Sales Asst.

Disciplinary Information

There have been no legal or disciplinary actions against Ms. Rowe.

Other Business Activities

Ms. Rowe serves as the Treasurer of the Prout's Neck Sanctuary, which is a non-profit entity within the Prout's Neck Association; as a Trustee of Maine Huts & Trails; and a Trustee of the Amelia Peabody Charitable Fund.

Additional Compensation

Ms. Rowe is a trustee of several trusts and in some cases receives compensation for those duties. In addition, she is a compensated Trustee of the Amelia Peabody Charitable Fund. Other than that, she does not receive economic benefits from any person or entity other than the Boston Family Office in connection with providing investment advice to clients.

Supervision

Each portfolio manager at the Boston Family Office operates independently. All of Ms. Rowe's accounts, and all investment management accounts of the Boston Family Office for that matter, are reviewed by the Investment Committee at least twice a year. The supervision is informal, but concerns can be raised to George P. Beal or Benjamin Richardson. Mr. Beal is the Managing Partner and Mr. Richardson is the Chief Investment Officer. They can be reached at (617) 624-0800.

Michael J. Unger, CFA
2776 Odell Drive
Erie, CO 80516

Educational Background and Business Experience

Mr. Unger was born in 1965.

Educational Background

University of Dayton	Graduated 1990
Dayton, OH	BA – Finance

Chartered Financial Analyst #222343 (please see the note at the end of this brochure regarding the CFA designation)

Business Background

Boston Family Office	2000 to present
Boston, MA	Portfolio Manager, Partner

Mellon Private Asset Management Boston, MA	1997 – 1999 Senior Portfolio Manager
Key Bank Dayton, OH	1992 – 1997 Portfolio Manager, Trader
Society Bank Dayton, OH	1991 – 1992 Credit Analyst

Disciplinary Information

There have been no legal or disciplinary actions against Mr. Unger.

Other Business Activities

Mr. Unger is not involved in any investment-related business apart from the Boston Family Office.

Additional Compensation

Mr. Unger is a trustee on several trusts and in some cases receives compensation for those duties. Other than that, he does not receive economic benefits from any person or entity other than the Boston Family Office in connection with providing investment advice to clients.

Supervision

Each portfolio manager at the Boston Family Office operates independently. All of Mr. Unger's accounts, and all investment management accounts of the Boston Family Office for that matter, are reviewed by the Investment Committee at least twice a year. The supervision is informal, but concerns can be raised to George P. Beal or Benjamin Richardson. Mr. Beal is the Managing Partner and Mr. Richardson is the Chief Investment Officer. They can be reached at (617) 624-0800.

Notes on Professional Designations

*** Chartered Financial Analyst designation**:

To earn a CFA charter, you must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in a six-hour exam. Completing the Program takes most candidates between two and five years.

*** Certified Financial Planner™ designation**:

CFP® professionals must master the 72 Principal Knowledge Topics under the categories below, as well as a comprehensive financial planning capstone course.

Principal Knowledge Topics: Investment planning, Tax planning, Retirement planning, Estate planning, Insurance planning, Financial management and Education planning.

In addition to completing a comprehensive financial planning curriculum approved by CFP Board, candidates for CFP® certification must have a bachelor's degree (or higher) in any discipline to become certified. Once certified, CFP® professionals are required to complete continuing education coursework, including a CFP Board approved ethics course, to ensure their competence in financial planning.

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